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Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code
(except black lung benefit trust or private foundation)

2009

Department of the Treasury
Internal Revenue Service

▶ The organization may have to use a copy of this return to satisfy state reporting requirements

Open to Public Inspection

For the 2009 calendar year, or tax year beginning Jun 1, 2009, and ending May 31, 2010

B Check if applicable: ☐ Address change ☐ Name change ☐ Initial return ☐ Termination ☐ Amended return ☐ Application pending		C Name of organization Union Aid Society Number and street (or P O box if mail is not delivered to street addr) Room/suite 601 Thorn Street City, town or country State ZIP code + 4 Sewickley PA 15143		D Employer Identification Number 25-1045496	
F Name and address of principal officer Hanley Cox 610 Thorn Street Sewickley PA 15143		H(a) Is this a group return for affiliates? ☐ Yes ☒ No H(b) Are all affiliates included? ☐ Yes ☒ No If 'No,' attach a list (see instructions)		G Gross receipts \$ 734,251.	
I Tax-exempt status ☒ 501(c) (3) (insert no) ☐ 4947(a)(1) or ☐ 527		H(c) Group exemption number ▶			
J Website: ▶ N/A		K Form of organization ☒ Corporation ☐ Trust ☐ Association ☐ Other ▶			
L Year of Formation 1919		M State of legal domicile PA			

Part I Summary	
Activities & Governance	1 Briefly describe the organization's mission or most significant activities: The Union Aid Society exists to serve those in need who reside within the eleven municipalities of the Quaker Valley School District.
	2 Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its assets
	3 Number of voting members of the governing body (Part VI, line 1a) 3 19
	4 Number of independent voting members of the governing body (Part VI, line 1b) 4 19
	5 Total number of employees (Part V, line 2a) 5 1
	6 Total number of volunteers (estimate if necessary) 6 0
	7a Total gross unrelated business revenue from Part VIII, I column (C), line 12 7a 0.
Revenue	8 Contributions and grants (Part VIII, line 1h) 8 294,675.
	9 Program service revenue (Part VIII, line 2g) 9 80,632.
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d) 10 -86,646.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 1e) 11 288,661.
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) 12 458,844.
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3) 13 58,235.
	14 Benefits paid to or for members (Part IX, column (A), line 4) 14 70,668.
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) 15 55,961.
	16a Professional fundraising fees (Part IX, column (A), line 11e) 16a 58,534.
	b Total fundraising expenses (Part IX, column (D), line 25) ▶ 12,437.
	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f) 17 107,286.
	18 Total expenses Add lines 13-17 (must equal Part IX, column (A), line 25) 18 221,482.
Net Assets or Fund Balances	19 Revenue less expenses Subtract line 18 from line 12 19 67,179.
	20 Total assets (Part X, line 16) 20 2,562,100.
	21 Total liabilities (Part X, line 26) 21 115,399.
	22 Net assets or fund balances Subtract line 21 from line 20 22 2,446,701.

Part II Signature Block	
Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.	
Sign Here Signature of officer: <u>Gretchen R. Burnham</u> Type of print name and title: <u>Gretchen R. Burnham</u>	Date: <u>10/12/10</u>
Paid Preparer's Use Only Preparer's signature: <u>Douglas J. Baker CPA</u> Date: <u>10/11/10</u> Firm's name (or yours if self-employed), address, and ZIP + 4: <u>Davis, Baker & Co.</u> <u>600 Commerce Drive, Suite 603</u> <u>Moon Township PA 15108</u>	Check if self-employed ☒ Preparer's identifying number (see instructions): EIN ▶ Phone no ▶ (412) 262-2443

May the IRS discuss this return with the preparer shown above? (see instructions)

☒ Yes ☐ No

BAA For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.

TEEA0101 07/20/09 Form 990 (2009)

617183

Part III Statement of Program Service Accomplishments

1 Briefly describe the organization's mission.

The Union Aid Society exists
to serve those in need who reside within the eleven municipalities
of the Quaker Valley School District.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If 'Yes,' describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If 'Yes,' describe these changes on Schedule O.

4 Describe the exempt purpose achievements for each of the organization's three largest program services by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

4a (Code:) (Expenses \$ 153,788. including grants of \$ 0.) (Revenue \$ 103,223.)

Proper living quarters for elderly

4b (Code:) (Expenses \$ 107,288. including grants of \$ 70,668.) (Revenue \$ 346,218.)

Financial help for needy persons in area

4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4d Other program services. (Describe in Schedule O.)

(Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses ▶ 261,076.

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If 'Yes,' complete Schedule A	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors?	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If 'Yes,' complete Schedule C, Part I		X
4 Section 501(c)(3) organizations Did the organization engage in lobbying activities? If 'Yes,' complete Schedule C, Part II		X
5 Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations. Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? If 'Yes,' complete Schedule C, Part III		
6 Did the organization maintain any donor advised funds or any similar funds or accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If 'Yes,' complete Schedule D, Part I		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? If 'Yes,' complete Schedule D, Part II		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If 'Yes,' complete Schedule D, Part III		X
9 Did the organization report an amount in Part X, line 21; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If 'Yes,' complete Schedule D, Part IV		X
10 Did the organization, directly or through a related organization, hold assets in term, permanent, or quasi-endowments? If 'Yes,' complete Schedule D, Part V		X
11 Is the organization's answer to any of the following questions 'Yes'? If so, complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable	X	
• Did the organization report an amount for land, buildings and equipment in Part X, line 10? If 'Yes,' complete Schedule D, Part VI		
• Did the organization report an amount for investments— other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VII		
• Did the organization report an amount for investments— program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VIII		
• Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part IX		
• Did the organization report an amount for other liabilities in Part X, line 25? If 'Yes,' complete Schedule D, Part X		
• Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48? If 'Yes,' complete Schedule D, Part X		
12 Did the organization obtain separate, independent audited financial statement for the tax year? If 'Yes,' complete Schedule D, Parts XI, XII, and XIII	X	
12A Was the organization included in consolidated, independent audited financial statement for the tax year? If 'Yes,' completing Schedule D, Parts XI, XII, and XIII is optional	X	
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the United States? If 'Yes,' complete Schedule F, Part I		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? If 'Yes,' complete Schedule F, Part II		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? If 'Yes,' complete Schedule F, Part III		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If 'Yes,' complete Schedule G, Part I		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If 'Yes,' complete Schedule G, Part II		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If 'Yes,' complete Schedule G, Part III		X
20 Did the organization operate one or more hospitals? If 'Yes,' complete Schedule H		X

Part IV Checklist of Required Schedules (continued)

	Yes	No
21 Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? <i>If 'Yes,' complete Schedule I, Parts I and II</i>		X
22 Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If 'Yes,' complete Schedule I, Parts I and II</i>	X	
23 Did the organization answer 'Yes' to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If 'Yes,' complete Schedule J</i>		X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, and that was issued after December 31, 2002? <i>If 'Yes,' answer lines 24b through 24d and complete Schedule K. If 'No,' go to line 25</i>		X
24b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
24c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
24d Did the organization act as an 'on behalf of' issuer for bonds outstanding at any time during the year?		
25a Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If 'Yes,' complete Schedule L, Part I</i>		X
25b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If 'Yes,' complete Schedule L, Part I</i>		X
26 Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If 'Yes,' complete Schedule L, Part II</i>		X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor, or a grant selection committee member, or to a person related to such an individual? <i>If 'Yes,' complete Schedule L, Part III</i>	X	
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
28a A current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
28b A family member of a current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
28c An entity of which a current or former officer, director, trustee, or key employee of the organization (or a family member) was an officer, director, trustee, or direct or indirect owner? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If 'Yes,' complete Schedule M</i>		X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If 'Yes,' complete Schedule M</i>		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If 'Yes,' complete Schedule N, Part I</i>		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If 'Yes,' complete Schedule N, Part II</i>		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If 'Yes,' complete Schedule R, Part I</i>		X
34 Was the organization related to any tax-exempt or taxable entity? <i>If 'Yes,' complete Schedule R, Parts II, III, IV, and V, line 1</i>		X
35 Is any related organization a controlled entity within the meaning of section 512(b)(13)? <i>If 'Yes,' complete Schedule R, Part V, line 2</i>		X
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If 'Yes,' complete Schedule R, Part V, line 2</i>		X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If 'Yes,' complete Schedule R, Part VI</i>		X
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? Note. All Form 990 filers are required to complete Schedule O	X	

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Part V Statements Regarding Other IRS Filings and Tax Compliance

		Yes	No
1 a	Enter the number reported in Box 3 of form 1096, Annual Summary and Transmittal of U.S. Information Returns. Enter -0- if not applicable.	11	
1 b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable.	0	
1 c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	X	
2 a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return.	1	
2 b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return (see instructions).	X	
3 a	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?		X
3 b	If 'Yes,' has it filed a Form 990-T for this year? If 'No,' provide an explanation in Schedule O.		
4 a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
4 b	If 'Yes,' enter the name of the foreign country: See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
5 a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
5 b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
5 c	If 'Yes,' to line 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?		
6 a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?		X
6 b	If 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not deductible?		
7	Organizations that may receive deductible contributions under section 170(c).		
7 a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?		X
7 b	If 'Yes,' did the organization notify the donor of the value of the goods or services provided?		
7 c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
7 d	If 'Yes,' indicate the number of Forms 8282 filed during the year.		
7 e	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
7 f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
7 g	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?		
7 h	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?		
8	Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?		
9	Sponsoring organizations maintaining donor advised funds.		
9 a	Did the organization make any taxable distributions under section 4966?		
9 b	Did the organization make any distribution to a donor, donor advisor, or related person?		
10	Section 501(c)(7) organizations. Enter:		
10 a	Initiation fees and capital contributions included on Part VIII, line 12.		
10 b	Gross Receipts, included on Form 990, Part VIII, line 12, for public use of club facilities.		
11	Section 501(c)(12) organizations. Enter:		
11 a	Gross income from other members or shareholders.		
11 b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)		
12 a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?		
12 b	If 'Yes,' enter the amount of tax-exempt interest received or accrued during the year.		

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Part VI Governance, Management and Disclosure For each 'Yes' response to lines 2 through 7b below, and for a 'No' response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Section A. Governing Body and Management

	Yes	No
1a Enter the number of voting members of the governing body	1a	19
b Enter the number of voting members that are independent	1b	19
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee or key employee?	2	X
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?	3	X
4 Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?	4	X
5 Did the organization become aware during the year of a material diversion of the organization's assets?	5	X
6 Does the organization have members or stockholders?	6	X
7a Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?	7a	X
b Are any decisions of the governing body subject to approval by members, stockholders, or other persons?	7b	X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a The governing body?	8a	X
b Each committee with authority to act on behalf of the governing body?	8b	X
9 Is there any officer, director or trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If 'Yes,' provide the names and addresses in Schedule O	9	X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
10a Does the organization have local chapters, branches, or affiliates?	10a	X
b If 'Yes,' does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?	10b	
11 Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form?	11	X
11A Describe in Schedule O the process, if any, used by the organization to review this Form 990		
12a Does the organization have a written conflict of interest policy? If 'No,' go to line 13	12a	X
b Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	X
c Does the organization regularly and consistently monitor and enforce compliance with the policy? If 'Yes,' describe in Schedule O how this is done	12c	X
13 Does the organization have a written whistleblower policy?	13	X
14 Does the organization have a written document retention and destruction policy?	14	X
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
a The organization's CEO, Executive Director, or top management official	15a	X
b Other officers of key employees of the organization	15b	X
If 'Yes' to line 15a or 15b, describe the process in Schedule O (See instructions)		
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a	X
b If 'Yes,' has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?	16b	

Section C. Disclosures

17 List the states with which a copy of this Form 990 is required to be filed ▶ Pennsylvania

18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.

☐ Own website ☐ Another's website ☒ Upon request

19 Describe in Schedule O whether (and if so, how) the organization makes its governing documents, conflict of interest policy, and financial statements available to the public

20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization:

▶ Mrs. Gretchen Burnham 601 Thorn Street, Sewickley PA 15143 (412) 741-9240

[illegible]

1 b Total

50,830.

0.

0.

	Yes	No
3		X
4		X
5		X

(A) Name and business address	(B) Description of Services	(C) Compensation

Form 990 (2009)

Part VIII Statement of Revenue

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
CONTRIBUTIONS, GIFTS, GRANTS AND OTHER SIMILAR AMOUNTS	1 a Federated campaigns	1 a				
	b Membership dues	1 b				
	c Fundraising events	1 c				
	d Related organizations	1 d				
	e Government grants (contributions)	1 e 200,000.				
	f All other contributions, gifts, grants, and similar amounts not included above	1 f 146,218.				
	g Noncash contribns included in lns 1a-1f	\$ 17,893.				
	h Total. Add lines 1a-1f		346,218.			
PROGRAM SERVICE REVENUE		Business Code				
	2 a Resident charges	531110	103,223.	103,223.	0.	0.
	b _____					
	c _____					
	d _____					
	e _____					
	f All other program service revenue					
	g Total. Add lines 2a-2f		103,223.			
OTHER REVENUE	3 Investment income (including dividends, interest and other similar amounts)		12,069.	0.	0.	12,069.
	4 Income from investment of tax-exempt bond proceeds					
	5 Royalties					
	6 a Gross Rents	(i) Real (ii) Personal				
	b Less: rental expenses					
	c Rental income or (loss)					
	d Net rental income or (loss)					
	7 a Gross amount from sales of assets other than inventory	(i) Securities (ii) Other				
	b Less: cost or other basis and sales expenses					
	c Gain or (loss)					
	d Net gain or (loss)		-2,666.	0.	0.	-2,666.
	8 a Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18	a				
	b Less: direct expenses	b				
	c Net income or (loss) from fundraising events					
	9 a Gross income from gaming activities. See Part IV, line 19	a				
	b Less: direct expenses	b				
	c Net income or (loss) from gaming activities					
	10 a Gross sales of inventory, less returns and allowances	a				
	b Less: cost of goods sold	b				
	c Net income or (loss) from sales of inventory					
Miscellaneous Revenue		Business Code				
11 a _____						
b _____						
c _____						
d All other revenue						
e Total. Add lines 11a-11d						
12 Total revenue. See instructions		458,844.	103,223.	0.	9,403.	

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

<i>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</i>	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21				
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22	70,668.	70,668.		
3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	51,227.	46,104.	5,123.	0.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1) and persons described in section 4958(c)(3)(B))				
7 Other salaries and wages				
8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions)				
9 Other employee benefits				
10 Payroll taxes	7,307.	6,576.	731.	0.
11 Fees for services (non-employees)				
a Management				
b Legal				
c Accounting	6,401.	0.	6,401.	0.
d Lobbying				
e Prof fundraising svcs. See Part IV, ln 17				
f Investment management fees				
g Other	10,564.	0.	10,564.	0.
12 Advertising and promotion	2,310.	0.	2,310.	0.
13 Office expenses	3,581.	834.	2,747.	0.
14 Information technology				
15 Royalties				
16 Occupancy	70,094.	70,094.	0.	0.
17 Travel				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	66,141.	65,300.	841.	0.
23 Insurance	3,539.	0.	3,539.	0.
24 Other expenses. Itemize expenses not covered above. (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below.)				
a Fundraising	12,437.	0.	0.	12,437.
b Special donations	1,500.	1,500.	0.	0.
c Telephone & internet	1,364.	0.	1,364.	0.
d				
e				
f All other expenses				
25 Total functional expenses. Add lines 1 through 24f	307,133.	261,076.	33,620.	12,437.
26 Joint costs. Check here ☐ if following SOP 98-2. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

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Form 990 (2009)

Part X Balance Sheet

		(A) Beginning of year		(B) End of year
ASSETS	1 Cash — non-interest-bearing	93,633.	1	105,504.
	2 Savings and temporary cash investments	111,753.	2	238,022.
	3 Pledges and grants receivable, net	156,887.	3	97,620.
	4 Accounts receivable, net		4	
	5 Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L		5	
	6 Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	11,621.	9	10,111.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 2,107,516.		
	b Less: accumulated depreciation.	10b 743,495.		
		1,396,735.	10c	1,364,021.
	11 Investments — publicly-traded securities	790,892.	11	868,503.
	12 Investments — other securities. See Part IV, line 11		12	
	13 Investments — program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
15 Other assets. See Part IV, line 11	579.	15	2,181.	
16 Total assets. Add lines 1 through 15 (must equal line 34)	2,562,100.	16	2,685,962.	
LIABILITIES	17 Accounts payable and accrued expenses	115,399.	17	17,450.
	18 Grants payable		18	
	19 Deferred revenue		19	
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		22	
	23 Secured mortgages and notes payable to unrelated third parties		23	
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities. Complete Part X of Schedule D		25	
	26 Total liabilities. Add lines 17 through 25	115,399.	26	17,450.
	NET ASSETS OR FUND BALANCES	Organizations that follow SFAS 117, check here ☒ and complete lines 27 through 29 and lines 33 and 34.		
27 Unrestricted net assets		2,251,593.	27	2,543,392.
28 Temporarily restricted net assets		195,108.	28	125,120.
29 Permanently restricted net assets			29	
Organizations that do not follow SFAS 117, check here ☐ and complete lines 30 through 34.				
30 Capital stock or trust principal, or current funds			30	
31 Paid-in or capital surplus, or land, building, and equipment fund			31	
32 Retained earnings, endowment, accumulated income, or other funds			32	
33 Total net assets or fund balances		2,446,701.	33	2,668,512.
34 Total liabilities and net assets/fund balances		2,562,100.	34	2,685,962.

BAA

Form 990 (2009)

Part XI Financial Statements and Reporting

- 1 Accounting method used to prepare the Form 990 ☐ Cash ☒ Accrual ☐ Other

If the organization changed its method of accounting from a prior year or checked 'Other,' explain in Schedule O.

- 2a Were the organization's financial statements compiled or reviewed by an independent accountant?

- b Were the organization's financial statements audited by an independent accountant?

- c If 'Yes' to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?

If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O

- d If 'Yes' to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a consolidated basis, separate basis, or both:

☒ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis

- 3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?

- b If 'Yes,' did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits

	Yes	No
2a		X
2b	X	
2c	X	
3a		X
3b		

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Form 990 (2009)

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

► Attach to Form 990 or Form 990-EZ. ► See separate instructions.

OMB No 1545-0047

2009

Open to Public
Inspection

Name of the organization

Union Aid Society

Employer identification number

25-1045496

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

- 1 ☐ A church, convention of churches or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 ☐ A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E.)
- 3 ☐ A hospital or cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state _____
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 ☒ An organization that normally receives: (1) more than 33-1/3 % of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions — subject to certain exceptions, and (2) no more than 33-1/3 % of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 11 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3)**. Check the box that describes the type of supporting organization and complete lines 11e through 11h.
 - a ☐ Type I
 - b ☐ Type II
 - c ☐ Type III — Functionally integrated
 - d ☐ Type III — Other
- e ☐ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
- f If the organization received a written determination from the IRS that is a Type I, Type II or Type III supporting organization, check this box ☐
- g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

- (i) a person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?
- (ii) a family member of a person described in (i) above?
- (iii) a 35% controlled entity of a person described in (i) or (ii) above?

	Yes	No
11 g (i)		
11 g (ii)		
11 g (iii)		

h Provide the following information about the supported organizations

(i) Name of Supported Organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization in col (i) listed in your governing document?		(v) Did you notify the organization in col (i) of your support?		(vi) Is the organization in col (i) organized in the U S?		(vii) Amount of Support
			Yes	No	Yes	No	Yes	No	
Total									

BAA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule A (Form 990 or 990-EZ) 2009

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions and membership fees received (Do not include 'unusual grants'.)						
2 Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf						
3 The value of services or facilities furnished to the organization by a governmental unit without charge. Do not include the value of services or facilities generally furnished to the public without charge.						
4 Total. Add lines 1-through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f).						
6 Public support. Subtract line 5 from line 4						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc. (see instructions)					12	
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here. ▶ ☐						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2009 (line 6, column (f) divided by line 11, column (f))	14	%
15 Public support percentage from 2008 Schedule A, Part II, line 14	15	%
16a 33-1/3 support test – 2009. If the organization did not check the box on line 13, and the line 14 is 33-1/3 % or more, check this box and stop here. The organization qualifies as a publicly supported organization. ▶ ☐		
b 33-1/3 support test – 2008. If the organization did not check a box on line 13, or 16a, and line 15 is 33-1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization. ▶ ☐		
17a 10%-facts-and-circumstances test – 2009. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and stop here. Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization. ▶ ☐		
b 10%-facts-and-circumstances test – 2008. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and stop here. Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization. ▶ ☐		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions. ▶ ☐		

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Schedule A (Form 990 or 990-EZ) 2009

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 9 of Part I.)

Section A. Public Support

Calendar year (or fiscal yr beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions and membership fees received. (Do not include 'unusual grants'.)	88,392.	641,366.	390,850.	294,675.	346,218.	1,761,501.
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in a activity that is related to the organization's tax-exempt purpose	61,432.	74,270.	78,229.	80,632.	103,223.	397,786.
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5	149,824.	715,636.	469,079.	375,307.	449,441.	2,159,287.
7a Amounts included on lines 1, 2, 3 received from disqualified persons	25,829.	342,456.	58,989.	118,748.	229,678.	775,700.
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of 1% of the amount on line 13 for the year	0.	0.	0.	0.	0.	0.
c Add lines 7a and 7b	25,829.	342,456.	58,989.	118,748.	229,678.	775,700.
8 Public support. (Subtract line 7c from line 6.)						1,383,587.

Section B. Total Support

Calendar year (or fiscal yr beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
9 Amounts from line 6	149,824.	715,636.	469,079.	375,307.	449,441.	2,159,287.
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	35,448.	57,056.	92,962.	28,759.	12,069.	226,294.
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b	35,448.	57,056.	92,962.	28,759.	12,069.	226,294.
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
13 Total support. (add lines 9, 10c, 11, and 12.)						2,385,581.

14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ☐**Section C. Computation of Public Support Percentage**

15 Public support percentage for 2009 (line 8, column (f) divided by line 13, column (f))	15	58.00 %
16 Public support percentage from 2008 Schedule A, Part III, line 15	16	61.98 %

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2009 (line 10c, column (f) divided by line 13, column (f))	17	9.49 %
18 Investment income percentage from 2008 Schedule A, Part III, line 17	18	11.12 %

19a 33-1/3 support tests – 2009. If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and stop here. The organization qualifies as a publicly supported organization ☒**b 33-1/3 support tests – 2008.** If the organization did not check a box on line 14 or 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and stop here. The organization qualifies as a publicly supported organization ☐**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐

Part IV **Supplemental Information.** Complete this part to provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Provide any other additional information. See instructions.

Area for supplemental information with horizontal dashed lines.

**SCHEDULE D
(Form 990)**

Department of the Treasury
Internal Revenue Service

Name of the organization

Supplemental Financial Statements

- ▶ Complete if the organization answered 'Yes,' to Form 990,
Part IV, lines 6, 7, 8, 9, 10, 11, or 12.
▶ Attach to Form 990. ▶ See separate instructions

OMB No 1545-0047

2009

**Open to Public
Inspection**

Employer identification number

Union Aid Society

25-1045496

Part II Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts Complete if the organization answered 'Yes' to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate contributions to (during year)		
3 Aggregate grants from (during year)		
4 Aggregate value at end of year		

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may be used only for charitable purposes and not for the benefit of the donor or donor advisor or for any other purpose conferring impermissible private benefit?? ☐ Yes ☐ No

Part III Conservation Easements Complete if the organization answered 'Yes' to Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

☐ Preservation of land for public use (e.g., recreation or pleasure)	☐ Preservation of an historically important land area
☐ Protection of natural habitat	☐ Preservation of certified historic structure
☐ Preservation of open space	

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 8/17/06	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ _____

4 Number of states where property subject to conservation easement is located ▶ _____

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easement it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year ▶ _____

7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ▶ \$ _____

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements

Part IV Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets Complete if the organization answered 'Yes' to Form 990, Part IV, line 8.

1 a If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items

b If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenues included in Form 990, Part VIII, line 1 ▶ \$ _____

(ii) Assets included in Form 990, Part X ▶ \$ _____

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items.

a Revenues included in Form 990, Part VIII, line 1 ▶ \$ _____

b Assets included in Form 990, Part X ▶ \$ _____

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3 Using the organization's acquisition accession and other records, check any of the following that are a significant use of its collection items (check all that apply):

a ☐ Public exhibition

d ☐ Loan or exchange programs

b ☐ Scholarly research

e ☐ Other _____

c ☐ Preservation for future generations

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?

☐ Yes

☐ No

Part IV Escrow and Custodial Arrangements Complete if organization answered 'Yes' to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X?

☐ Yes

☐ No

b If 'Yes,' explain the arrangement in Part XIV and complete the following table:

c Beginning balance

d Additions during the year

e Distributions during the year

f Ending balance

	Amount
1c	
1d	
1e	
1f	

2a Did the organization include an amount on Form 990, Part X, line 21?

☐ Yes

☐ No

b If 'Yes,' explain the arrangement in Part XIV.

Part V Endowment Funds Complete if organization answered 'Yes' to Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

2 Provide the estimated percentage of the year end balance held as:

a Board designated or quasi-endowment ▶ _____ %

b Permanent endowment ▶ _____ %

c Term endowment ▶ _____ %

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

(i) unrelated organizations

(ii) related organizations

	Yes	No
3a(i)		
3a(ii)		
3b		

b If 'Yes' to 3a(ii), are the related organizations listed as required on Schedule R?

4 Describe in Part XIV the intended uses of the organization's endowment funds

Part VI Investments—Land, Buildings, and Equipment. See Form 990, Part X, line 10.

Description of investment	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated Depreciation	(d) Book Value
1a Land	92,697.			92,697.
b Buildings	1,990,155.		721,008.	1,269,147.
c Leasehold improvements				
d Equipment	24,664.		22,487.	2,177.
e Other				
Total. Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c).)				

1,364,021.

BAA

Schedule D (Form 990) 2009

Part VII Investments—Other Securities See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation Cost or end-of-year market value
Financial derivatives		
Closely-held equity interests		
Other		
Total. (Column (b) must equal Form 990 Part X, col. (B) line 12.)		

Part VIII Investments—Program Related (See Form 990, Part X, line 13)

(a) Description of investment type	(b) Book value	(c) Method of valuation Cost or end-of-year market value
Total. (Column (b) must equal Form 990, Part X, col. (B) line 13.)		

Part IX Other Assets (See Form 990, Part X, line 15)

(a) Description	(b) Book value
Accrued interest receivable	2,181.
Total. (Column (b) must equal Form 990, Part X, col. (B), line 15.)	2,181.

Part X Other Liabilities (See Form 990, Part X, line 25)

(a) Description of Liability	(b) Amount
Federal Income Taxes	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.)	

2. FIN 48 Footnote In Part XIV, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48

Part XI Reconciliation of Change in Net Assets from Form 990 to Financial Statements

1	Total revenue (Form 990, Part VIII, column (A), line 12)	458,844.
2	Total expenses (Form 990, Part IX, column (A), line 25)	307,133.
3	Excess or (deficit) for the year Subtract line 2 from line 1	151,711.
4	Net unrealized gains (losses) on investments	
5	Donated services and use of facilities	
6	Investment expenses	
7	Prior period adjustments	
8	Other (Describe in Part XIV)	
9	Total adjustments (net). Add lines 4 through 8	
10	Excess or (deficit) for the year per audited financial statements Combine lines 3 and 9	151,711.

Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

1	Total revenue, gains, and other support per audited financial statements	1	528,944.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains on investments	2a	70,100.
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV)	2d	
e	Add lines 2a through 2d	2e	70,100.
3	Subtract line 2e from line 1	3	458,844.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investments expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	
5	Total revenue Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)	5	458,844.

Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements	1	307,133.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIV)	2d	
e	Add lines 2a through 2d	2e	
3	Subtract line 2e from line 1	3	307,133.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investments expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	
5	Total expenses Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	5	307,133.

Part XIV Supplemental Information

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, line 8; Part XII, lines 2d and 4b; and Part XIII, lines 2d and 4b. Also complete this part to provide any additional information.

Part XIV Supplemental Information *(continued)*

SCHEDULE I
(Form 990)

(Form 990)

Grants and Other Assistance to Organizations, Governments and Individuals in the United States

2009

Complete if the organization answered 'Yes,' to Form 990, Part IV, lines 21 or 22.

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Name of the organization

Union Aid Society

Employer Identification number

25-1045496

Part I	General Information on Grants and Assistance
--------	--

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

☒ Yes ☐ No

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

Part II Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered 'Yes' to Form

990 Part IV, line 21 for any recipient that received more than \$5,000. Check this box if no one recipient received more than \$5,000. Use

Part IV and Schedule I-1 (Form 990) If additional space is needed

[illegible]

2 Enter total number of section 501(c)(3) and government organizations

3 Enter total number of other organizations

Part III Grants and Other Assistance to Individuals in the United States. Complete if the organization answered 'Yes' to Form 990, Part IV, line 22. Use Part IV and Schedule I-1 (Form 990) if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
Financial aid	105	31,775.	0.	cash outlay	n/a
Back-to-school aid	120	12,000.	0.	gift cards	n/a
In kind support	73	0.	17,893.	Face value of gift card	gift card donations
Scholarships	3	9,000.	0.	cash outlay	n/a
Other community support	0	0.	0.	cash outlay	n/a

Part IV Supplemental Information. Complete this part to provide the information required in Part I, line 2, and any other additional information.

Pt I Line 2 Individuals receiving disbursements from the Union Aid Society are

Pt I Line 2 individuals who require assistance, based on the executive directors

Pt I Line 2 determination. Larger amounts of assistance are brought before

Pt I Line 2 the "financial aid committee" of the organization, where close

Pt I Line 2 oversight is adhered to.

SCHEDULE L
(Form 990 or 990-EZ)Department of the Treasury
Internal Revenue Service**Transactions with Interested Persons**

- Complete if the organization answered
'Yes' on Form 990, Part IV, line 25a, 25b, 26, 27, 28a, 28b, or 28c,
or Form 990-EZ, Part V, line 38a or 40b.
► Attach to Form 990 or Form 990-EZ. ► See separate instructions.

OMB No 1545-0047

2009**Open to Public
Inspection**

Name of the organization

Union Aid Society

Employer identification number

25-1045496

Part I Excess Benefit Transactions (section 501(c)(3) and section 501(c)(4) organizations only).
Complete if the organization answered 'Yes' on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b.

1	(a) Name of disqualified person	(b) Description of transaction	(c) Corrected?	
			Yes	No

2 Enter the amount of tax imposed on the organization managers or disqualified persons during the year under section 4958 ► \$

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization ► \$

Part II Loans to and/or From Interested Persons.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 26 or Form 990-EZ, Part V, line 38a.

(a) Name of interested person and purpose	(b) Loan to or from the organization?		(c) Original principal amount	(d) Balance due	(e) In default?		(f) Approved by board or committee?		(g) Written agreement?	
	To	From			Yes	No	Yes	No	Yes	No
Total ► \$										

Part III Grants or Assistance Benefitting Interested Persons.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 27.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount and type of assistance
Kathy Shields	Board member	333. Food, medical & other
Kathy Shields	Board member	1,900. Rent
Kathy Shields	Board member	166. Utility bills

Part IV Business Transactions Involving Interested Persons.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction \$	(d) Description of transaction	(e) Sharing of organization's revenues?	
				Yes	No

BAA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990
or 990-EZ.

Schedule L (Form 990 or 990-EZ) 2009

The Union Aid Society
By-Laws
December 16, 1974
Amended May 6, 1992
Amended May 10, 2006
Amended August 12, 2009

ARTICLE I
Name and Place of Business

The name of the Corporation shall be the Union Aid Society (the "Corporation"). The Corporation shall have its principal office at 601 Thorn Street, Sewickley, Pa 15143. The Corporation may operate other offices or places of operation as its Board of Directors may from time to time determine.

ARTICLE II
Purposes

Section 1. General Purposes: The Corporation is organized and shall be operated exclusively, without limitation, for charitable, scientific, civic and educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, and the regulations promulgated there under or any corresponding provisions of any subsequent federal tax laws, including, without limitation, the making of distributions to organizations that qualify as tax exempt organizations under said Section. No part of the net earnings of the Corporation shall inure to the benefit of, or be distributed to any private individual, except that the Corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of its purposes. No substantial part of the activities of the Corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation except as permitted by Section 501(h) of the Internal Revenue Code of 1986, as amended, or any applicable subsequent federal tax law. The Corporation shall further not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of any candidate for public office. Notwithstanding any other provision of these By-Laws, the Corporation shall not carry on any other activities not permitted to be carried on by an organization exempt from federal income tax under Section 501(a) of the Internal Revenue Code of 1986, as amended, described in Section 501(c)(3) thereof, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code of 1986, or the corresponding provisions of any subsequent federal tax law.

Section 2. Specific Purpose: The Union Aid Society exists to serve those in need who reside within the eleven boroughs of the Quaker Valley School District.

ARTICLE III Directors

Section 1. There shall be no members, as such, of the Corporation, and all rights, duties, powers and privileges of the members as provided by law or the Articles of Incorporation shall vest in and be enjoyed by the Board of Directors, which shall manage the affairs and property of the Corporation.

Section 2. The Board of Directors (the "Board") shall consist of not less than five (5) nor more than twenty three (23) Directors ("Director(s)"). Each Director shall be elected by the incumbent Directors, from a list of candidates submitted by a committee so designated by the President, as directed in Article IV, Section 4, to a term of three (3) years, which term shall automatically renew upon expiration unless otherwise terminated pursuant to Section 5 of this Article or any applicable policies and procedures adopted by the Corporation. The nominations for Directors may be made so that houses of worship in the Sewickley Valley expressing an interest in the Corporation and desiring to take part in its activities may be represented on the Board by at least one (1) Director. Representation of a house of worship on the Board shall be determined by the Board, which shall be empowered to issue regulations from time to time governing entitlement to such representation.

Section 3. No vacancy shall be considered to have occurred on the Board requiring a mandatory replacement unless the number of Directors becomes less than five (5). If a vacancy must be filled, it shall be done by a majority vote of the remaining Directors, and the Director so elected shall serve a full three (3) year term.

Section 4. A Director's term of office may be terminated by resignation, or removal with or without cause by the majority vote of the Directors at a duly organized meeting at which a quorum is present.

Section 5. Directors shall receive no compensation for their services.

Section 6. A minimum of 9 meetings of the Board shall be held per year as scheduled by the President. Special meetings may be called by the President as the President deems necessary, or upon the request of any five (5) members of the Board.

Section 7. Notices of both regular and special meetings of the Board shall be given at such times and in such manner as may be fixed by the Board.

Section 8. A quorum at any meeting shall consist of a majority of the active members of the Board. A majority of members present shall decide any question that may come before the meeting.

Section 9. Voting by the Board of Directors shall take place at a regularly scheduled meeting or at a special meeting called pursuant to these by-laws, and votes may be delivered in person by each Director, by means of telephone by each Director, or by any

other form of electronic media by each Director, using such form of electronic media as approved by the President.

Section 10. The annual meeting of the Board of Directors shall be held in May of each year at a time, date and place to be designated by the President. The election of Directors and Officers, if required, shall take place at this meeting. Notwithstanding the foregoing, Directors may be elected to fill a vacancy on the Board at any regular or special meeting held in accordance with the Policies of the Corporation.

Section 11. In addition to the regular Directors provided for in this Article, the Board may, in its sole discretion, elect any number of Honorary Directors for life, who shall have no voting or other rights relative to the operation of the Corporation, but who shall be persons whom the Board desires to commend for valuable services rendered to the Corporation.

ARTICLE IV Officers

Section 1. The Officers of the Corporation shall be a President, Vice President, Recording Secretary, Corresponding Secretary, Treasurer and Assistant Treasurer ("Officer(s)").

Section 2. The Executive Committee shall be comprised of the President, Vice President, Recording Secretary, Corresponding Secretary, Treasurer, Assistant Treasurer, and other Directors as designated by the President. The Executive Committee shall have the power to take any action relative to the management and affairs of the Corporation, subject to ratification by the Board.

Section 3. The Officers of the Corporation shall serve a two (2) year term and shall be elected by the Directors from their own number at the annual meeting at which their terms expire.

Section 4. The President shall supervise the management and activities of the corporation and perform such other duties as usually pertain to the office. The President shall designate and name committees as the President deems necessary and appropriate to further the business and lawful activities of the Corporation. The President shall preside at all meetings of the Board and of the Executive Committee, except as hereafter provided.

Section 5. The Vice President, shall perform the duties of the President in the President's absence or temporary inability to serve. The Vice President shall also perform such special duties as the President shall from time to time assign.

Section 6. The Recording Secretary shall keep minutes of all meetings of the Board and of the Executive Committee, together with such other duties as usually pertain to the office. The Recording Secretary shall ensure that said minutes are retained at the

principal place of business of the Corporation or at a place otherwise designated by the Board, in accordance with applicable law.

Section 7. The Corresponding Secretary shall conduct such correspondence as the Board or President shall direct.

Section 8. The Treasurer shall be the custodian of the funds and other intangible personal property of the Corporation. The Treasurer shall: (1) keep full and accurate accounts of receipts and disbursements of funds of the Corporation, (2) maintain a system in place such that all monies and other valuable effects are deposited in the name and to the credit of the Corporation in such depositories, bank accounts or safe deposit boxes as shall be designated by the Board of Directors, (3) provide to the Directors at the regular meetings of the Board of Directors or whenever they may require it, a report of the financial condition of the Corporation and such information concerning the financial condition of the Corporation as may be requested, (4) serve as chair of the Finance Committee or other such committee as designated and directed by the President, and (5) perform such other duties as may from time to time be assigned by the President or the Board of Directors and as usually pertain to the office of Treasurer. In performing these functions, the Treasurer may rely on employees of the Corporation or an affiliated corporation who possess special financial training and skills and whose employment responsibilities include management of the Corporation's financial affairs.

Section 9. The Assistant Treasurer shall aid the Treasurer in the performance of the Treasurer's duties and shall be responsible for the financial management of all business related to any and all real property owned, operated or managed by the Corporation.

Section 10. In addition to the above Officers, the Board of Directors is specially empowered to hire such employees, agents and other personnel as it sees fit to carry out the functions of the corporation.

Section 11. Officers shall receive no compensation for their services.

Section 12. Any Officer may resign at any time by giving written notice to the Recording Secretary. Any such resignation shall take effect at the date of receipt of such notice or at any later time specified therein and, unless otherwise specified therein, the acceptance of such resignation shall not be necessary to make it effective.

Section 13. Any Officer may be removed, with or without cause, by the Board of Directors of the Corporation, provided such removal is in compliance with the applicable policies and procedures of the Corporation.

ARTICLE V

Standard of Care, Immunity and Indemnification

Section 1. Standard of Care for Directors. A Director of the Corporation shall stand in a fiduciary relationship to the Corporation and shall perform his or her duties as a Director, including duties as a member of any committee of the Board of Directors upon which he or she may serve, in good faith, in a manner he or she reasonably believes to be in the best interest of the Corporation and with such care, including reasonable inquiry, skill and diligence, as a person of ordinary prudence would use under similar circumstances.

Section 2. Standard of Care for Officers. An Officer shall perform his or her duties as an Officer in good faith, in a manner which he or she reasonably believes to be in the best interest of the Corporation and with such care, including reasonable inquiry, skill and diligence, as a person of ordinary prudence would use under similar circumstances. A person who so performs his or her duties in accordance with the foregoing shall not be liable by reason of having been an Officer of the Corporation.

Section 3. Immunity. To the fullest extent permitted by law, no present or future Director of the Corporation shall be personally liable for monetary damages for any action taken, or any failure to take action, unless:

A. The Director has breached or failed to perform the duties of his or her office in a manner meeting the applicable standards of the law; and

B. The breach or failure to perform constitutes self-dealing, willful misconduct or recklessness.

The immunity provided by this section shall not apply to liability of the Director pursuant to a criminal statute or for the Director's failure to pay taxes pursuant to local, State or Federal law. The immunity and other rights and privileges set forth herein shall be construed to grant the maximum protection allowed by the laws of the Commonwealth of Pennsylvania and shall in no way be construed to be restriction or limitation of any other right, privilege or immunity granted by the laws of the Commonwealth of Pennsylvania.

Absent breach of fiduciary duty, lack of good faith or self-dealing, any act of the Board of Directors, a committee of the Board of Directors or an individual Director shall be presumed to be in the best interest of the Corporation.

Section 4. Indemnification. Each present and future Director or Officer of the corporation and the legal representatives of each such Director or Officer, shall be indemnified by the corporation against reasonable costs, expenses (exclusive of any amount paid to the corporation) and counsel fees paid or incurred in connection with any threatened, pending or completed action, suit or proceeding to which any such Director or Officer, or his or her legal representative, may be made party by reason of his or her being or having been a Director or Officer, to the maximum extent permitted by Pennsylvania Nonprofit Corporation Law; provided, counsel fees paid or incurred prior to such individual having submitted written notice thereof to the corporation shall be subject to approval of the Board. No such indemnification shall be permitted if such

indemnification would jeopardize the Corporation's tax exempt status under Section 501 (a) of the Internal Revenue Code, or result in the Corporation's failure to be described in Section 501(c)(3) of the Code, or would be otherwise prohibited by law.

Section 5. Indemnification of Employees and Agents. The Board of Directors of the corporation in its discretion shall have the power to indemnify any employee or agent of the corporation against reasonable costs, expenses (exclusive of any amount paid to the corporation) and counsel fees paid or incurred in connection with any threatened, pending or completed action, suit or proceeding to which any such employee or agent may be made party by reason of his or her being or having been an employee or agent of the corporation, to the maximum extent permitted by Pennsylvania Nonprofit Corporation Law. No such indemnification shall be permitted if such indemnification would jeopardize the Corporation's tax exempt status under Section 501 (a) of the Internal Revenue Code, or result in the Corporation's failure to be described in Section 501(c)(3) of the Code, or would be otherwise prohibited by law.

Section 6. Nonexclusive Right. Such right of indemnification shall be in addition to, and not in restriction or limitation of, any other privilege or power which the corporation may have with respect to the indemnification or reimbursement of Directors, Officers, agents or employees.

Section 7. Advancement of Expenses. Expenses incurred by a present or future Director or Officer pursuant to this Article shall be paid by the Corporation in advance of the final disposition of such action, suit or proceeding upon receipt of an undertaking by or on behalf of such person to repay such advanced amount if it shall ultimately be determined that the person is not entitled to be indemnified pursuant to application of Pennsylvania law.

Section 8. Insurance. The Corporation may purchase and maintain insurance to protect itself and any person eligible to be indemnified hereunder against any liability or expense asserted against or incurred by such person in connection with any action, suit or proceeding.

ARTICLE VI By-Laws

The Board of Directors has the authority to recommend, approve and adopt the amendment or repeal of these bylaws or any provision hereof, by a majority vote of the entire membership of the Board of Directors at any regular or special meeting. Notice of any amendment or repeal of these bylaws must be provided to the Board of Directors in writing at least thirty (30) days in advance of the meeting at which the amendment or repeal is to be considered. The Board of Directors shall have the power to make minor revisions of syntax, grammar or spelling without adhering to the thirty (30) day notice provision specified herein.

ARTICLE VII Conflict of Interest

Any actual or potential conflict between a Director's personal interests and his duty to the Corporation shall be disclosed by the Director to the Board of Directors and made a matter of record, either through an annual procedure or when the conflict arises. Any Director deemed by the Board of Directors pursuant to its conflict of interest policy to be disqualified because of an actual or apparent conflict of interest on any matter shall not vote or use his personal influence on the matter, and shall not be counted in determining the quorum for the meeting, even when permitted by law. The minutes of the meeting shall reflect that a disclosure was made, the abstention from voting, and the effect on the quorum.

ARTICLE VIII Miscellaneous

Section 1. Policies and Procedures. The Directors of the Corporation shall have the power to adopt, ratify and change policies and procedures which govern the business of the Corporation. Said policies and procedures shall be proposed by such committees as are created by the President pursuant to Article IV, section 4, hereof, and shall be presented to the Executive Committee or other such committee as designated by the President for review. Proposed policies and procedures shall be presented at a regularly scheduled meeting to the Directors for approval, and shall be adopted and ratified by majority vote of the Directors provided a quorum is present at the meeting. The adopted and ratified policies and procedures shall be maintained in a written policies and procedures manual to be kept in the Corporation's principal place of business or other place as designated by the President.

Section 2. Confidentiality. All information obtained by the Board of Directors which is of a personal nature regarding the clients of the Corporation is considered confidential information, and no Director shall disclose such information to any person or entity unless specifically authorized by the client, or unless required by law.

Section 3. Financial Policies. In addition to all other duly enacted financial policies and procedures the Corporation shall require that all checks written on any accounts in the name of the Corporation shall be required to have two authorized signatures thereon.

Section 4. Books and Records. The Corporation shall keep an original or duplicate record of the proceedings of the Board of Directors, the original or a copy of its bylaws, including all amendments thereto to date, certified by the Secretary of the Corporation, and an original or duplicate register, giving the names of the members, the Directors and Officers, and showing their respective addresses and other details of each. The Corporation shall also keep appropriate, complete and accurate books or records of accounts. The records provided for herein shall be kept at either the registered office of the Corporation in the Commonwealth of Pennsylvania, or at its principal place of business, wherever situated.

ARTICLE IX
Fiscal Year

The fiscal year of the corporation shall begin on June 1 and end on May 31 of each year.

ARTICLE X
Dissolution

Section 1. This corporation may be dissolved by an affirmative vote of all but two (2) members of the Board of Directors. Two (2) notices of the proposed dissolution must be mailed to each active and Honorary Director. The first notice must be mailed at least sixty (60) days prior to the date of the meeting at which such vote is taken, and the second notice must be mailed at least ten (10) days prior to the meeting.

Section 2. If dissolution of the corporation is approved, its net assets shall be distributed as follows:

A. All liabilities and obligations shall be paid and discharged or adequate provisions made therefore.

B. Assets held by the corporation upon condition requiring return, transfer or conveyance, which condition occurs by reason of the dissolution, shall be returned, transferred or conveyed in accordance with such requirements.

C. Provisions shall be made for the disposal of all records and property.

D. With the approval of the Board of Directors as provided in Section 1. of this Article, remaining assets after all debts and obligations have been discharged shall be transferred or conveyed to one or more similar corporations, trusts, societies or other organizations in the Sewickley area, the purposes of which are compatible with those of the Union Aid Society as stated in its charter, provided, however, that no distribution shall be made to any of the above organizations except those to which contributions are deductible for Federal income tax purposes as defined under Section 501(a) of the Internal Revenue Code of 1986, as amended, described in Section 501(c)(3) thereof. the contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code of 1986, and the regulations promulgated thereunder or any corresponding provisions of any subsequent federal tax laws and as they may be further amended or replaced from time to time or the corresponding provisions of any subsequent federal tax law.